

# Routing Manual

The screenshot displays the VFO EZ REQ application window. On the left is a navigation menu with options: Main, Items, Vendors, Supporting Docs, Form Info, Validations, Route History, Status History, Notifications, Ownership, Navigator, and Return to Home. The 'Main' option is highlighted with a red box. The top toolbar contains buttons: Route, Self Approve, Release, Suspend Line Items, View Form, Delete, Cancel, Convert To Full, and Renumber. The main content area is titled 'EZ REQ Information' and shows the following details:

- Requisition Number: BPD-GC230-03-0006
- Status: In Progress
- Number of Items: 1
- Version: BASE
- Stage: Requisition
- Total Amount: \$2,500.00
- Commitment: \$2,500.00

Below this is the 'General Information' section with various fields:

- Requisition Date: 09/23/2002
- Requisitioner: TNORTHRU
- Buyer: TNORTHRU
- Primary Product/Service Code: PR
- Originating Office: [Field]
- Payment Office: ARC/ASD/FMB
- Site: SETUP BUSINESS GROUP
- Delivery Date: [Field] OR
- Days After Award: 30 OR
- Period of Performance: [Field] To: [Field]
- Ship To: PUBLIC DEBT - PKB
- Mark For (optional): [Field]
- Organization: BPD
- Invoice Approver/COR: BOBBY C. GUNN
- Performance Start Date: [Field]
- Performance End Date: [Field]
- Credit Card Vendor: [Field]

At the bottom, there is a section for 'Default Accounting Information for New Items' with a 'Select Accounting Code' field and buttons for 'Alias...' and 'A/C Combo...'.

At the top of a PR (a Requisition) you will notice that there is some information in read only format, such as the PR number, the number of items, the total amount, and a sub-heading called **Status**.

**"In Progress"** means the PR is still open for changes, and thus it is with the PR creator or a reviewer.

**"Pending"** means it is with the approver and it is locked for changes, it can only be approved or disapproved at this point. If changes need to be made, then it should be disapproved by whoever has it, so it will be returned to the Requisitioner. If it is acceptable, it should be approved so funds will be committed and it will proceed to Procurement.

**"Pending Financial Approval"** means the PR has been approved and thus sent to the Financial Interface to Commit the money if the accounting information used is valid.

**"Released"** means the PR has been approved by the interface and the PR has been sent to the Procurement in-box to be assigned to a buyer.

**When you need to route a PR go to "Route History" on the left hand side of a PR:**

1. Go to route history and click "Route" or "Change Route" at the top (it is a blue button)
  2. Add the person as a reviewer if they are just checking the document and possibly making changes to it.
  3. Add the person as an approver if they will be the last person to see the PR before it comes to Procurement. **(Once you approve a PR it automatically comes to Procurement and the PR does not need any further action by the approver)**
  4. After you have selected their user ID, click "Send" to route the PR to the next person.
  5. Then once you see "Sent " next to their name in "Route History" you know it has gone through to them.
- \*After you see "Sent" next to the person's name that follows your name you should click the blue button at the top that says "mark reviewed" if you have been designated as a reviewer on this PR.

**VFO**

**EZ REQ**

Main  
Items  
Vendors  
Supporting Docs  
Form Info  
Validations  
**Route History**  
Status History  
Notifications  
Ownership  
Navigator  
Return to Home

Change Route Release View Form ?

**EZ REQ Information**  
Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$2,500.00  
Commitment: \$2,500.00

**Route History**

To	In Date	Out Date	Comments	Status	Version	Phone	Site
TRAIN TRAIN01	09/23/02 11:06 AM		N	Sent	BASE		BPD
THOMAS NORTHRUP		09/23/02 11:06 AM	Y	Originator	BASE		SETUP BUSINESS GROUP

"Sent" designates the PR is with that person, so TRAIN01 has the PR.

Comments

VPD PRISM - EZ REQ - Route History - Microsoft Internet Explorer provided by The Department of Treasury

File Edit View Favorites Tools Help

Address [http://clonedb.arcdmz.bpd.treas.gov/prsmclon/routehistory/route\\_history\\_f.asp](http://clonedb.arcdmz.bpd.treas.gov/prsmclon/routehistory/route_history_f.asp)

Change Route Mark Reviewed View Form ?

**EZ REQ Information**

Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$2,500.00  
Commitment: \$2,500.00

**Route History**

To	In Date	Out Date	Comments	Status	Version	Phone	Site
TRAIN TRAIN01	09/23/02 11:06 AM		N	Sent	BASE		BPD
THOMAS NORTHRUP		09/23/02 11:06 AM	Y	Originator	BASE		SETUP BUSINESS GROUP

1. For this example, I have logged in as TRAIN01, which is why the "Mark Reviewed" button has appeared, since this person is a reviewer for this PR.

2. After you have inspected the PR information, choose "Change Route"

VPD PRISM - Route - Microsoft Internet Explorer provided by The Department of Treasury

File Edit View Favorites Tools Help

Address [http://clonedb.arcdmz.bpd.treas.gov/prsmclon/route/route\\_f.asp](http://clonedb.arcdmz.bpd.treas.gov/prsmclon/route/route_f.asp)

Add Approver Add Reviewer Move Up Move Down Delete ?

**EZ REQ Information**

Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$2,500.00  
Commitment: \$2,500.00

**Route**

Select	Sequence	To	Site	Action	Type	In Date	Out Date
<input type="checkbox"/>	1	TRAIN TRAIN01	BPD	Sent	Review	09/23/02 11:06 AM	

Note from THOMAS NORTHRUP:  
Sent to Train01 for Review.

Routing List Comments:

Save Cancel

I have clicked "Add Reviewer" since one more person needs to look at this before the approver.

VPD PRISM - Add User To Route - Microsoft Internet Explorer provided by The Department of Treasury

File Edit View Favorites Tools Help

Address [http://clonedb.arcdmz.bpd.treas.gov/prsmclon/route/route\\_add\\_f.asp?type=REV](http://clonedb.arcdmz.bpd.treas.gov/prsmclon/route/route_add_f.asp?type=REV) Go Links »

Add User to Route

Search: User ID For: tr Display Cancel

Options: All Sites Max Results: 100 Results per Page: 10

User ID	First Name	Middle Initial	Last Name	Site
TRAIN01	TRAIN		TRAIN01	BPD
TRAIN02	TRAIN		TRAIN02	BPD
TRAIN03	TRAIN		TRAIN03	BPD
TRAIN04	TRAIN		TRAIN04	BPD
TRAIN05	TRAIN		TRAIN05	BPD
TRAIN06	TRAIN		TRAIN06	BPD
TRAIN07	TRAIN		TRAIN07	BPD
TRAIN08	TRAIN		TRAIN08	BPD
TRAIN09	TRAIN		TRAIN09	BPD
TRAIN10	TRAIN		TRAIN10	BPD

Next Page 1 of 2

Select the person's User ID. I am choosing TRAIN02.

Done Local intranet 11:13 AM

VPD PRISM - Route - Microsoft Internet Explorer provided by The Department of Treasury

File Edit View Favorites Tools Help

Address [http://clonedb.arcdmz.bpd.treas.gov/prsmclon/route/route\\_f.asp?button=add](http://clonedb.arcdmz.bpd.treas.gov/prsmclon/route/route_f.asp?button=add) Go Links »

VPD

Add Approver Add Reviewer Move Up Move Down Delete ?

EZ REQ Information

Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$2,500.00  
Commitment: \$2,500.00

Route

Select	Sequence	To	Site	Action	Type	In Date	Out Date
<input type="checkbox"/>	1	TRAIN TRAIN01	BPD	Sent	Review	09/23/02 11:06 AM	
<input checked="" type="checkbox"/>	1	TRAIN TRAIN02	BPD	Ready to send	Review		

Note from THOMAS NORTHROP:  
Sent to Train01 for Review.

Routing List Comments:

Send Save Cancel

Choose "Send" just as before.

VPO PRISM - EZ REQ - Route History - Microsoft Internet Explorer provided by The Department of Treasury

File Edit View Favorites Tools Help

Address [http://clonedb.arcdmz.bpd.treas.gov/prsmclon/routehistory/route\\_history\\_f.asp](http://clonedb.arcdmz.bpd.treas.gov/prsmclon/routehistory/route_history_f.asp)

Change Route Mark Reviewed View Form ?

**EZ REQ Information**

Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$2,500.00  
Commitment: \$2,500.00

**Route History**

To	In Date	Out Date	Comments	Status	Version	Phone	Site
TRAIN TRAIN01	09/23/02 11:06 AM		N	Sent	BASE		BPD
TRAIN TRAIN02	09/23/02 11:14 AM		N	Sent	BASE		BPD
THOMAS NORTHRUP		09/23/02 11:06 AM	Y	Originator	BASE		SETUP BUSINESS GROUP

Comments

1. Make sure it says "Sent" next to their name, and then it is okay to mark this PR reviewed.

2. Click "Mark Reviewed"

Done Local intranet 11:14 AM

Start Prism Language e-mail - Lo... Document1 - Microsoft Word VPO PRISM - EZ RE...

VPO PRISM - Review Document - Microsoft Internet Explorer provided by The Department of Treasury

File Edit View Favorites Tools Help

Address [http://clonedb.arcdmz.bpd.treas.gov/prsmclon/review/rev\\_f.asp](http://clonedb.arcdmz.bpd.treas.gov/prsmclon/review/rev_f.asp)

Click Mark Reviewed to return to document.

**EZ REQ Information**

Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$2,500.00  
Commitment: \$2,500.00

**Review Document**

Comments (up to 2000 characters):

Now I can mark it reviewed.

Mark Reviewed Cancel

Add comments as you feel they are necessary.

VPD PRISM - EZ REQ - Route History - Microsoft Internet Explorer provided by The Department of Treasury

Address [http://clonedb.arcdmz.bpd.treas.gov/prsmclon/routehistory/route\\_history\\_f.asp](http://clonedb.arcdmz.bpd.treas.gov/prsmclon/routehistory/route_history_f.asp)

View Form ?

**EZ REQ**

Main  
Items  
Vendors  
Supporting Docs  
Form Info  
Validations  
**Route History**  
Status History  
Notifications  
Ownership  
Navigator  
Return to Inbox

**EZ REQ Information**

Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$2,500.00  
Commitment: \$2,500.00

**Route History**

To	In Date	Out Date	Comments	Status	Version	Phone	Site
TRAIN TRAIN02	09/23/02 11:14 AM		N	Sent	BASE		BPD
TRAIN TRAIN01	09/23/02 11:06 AM	09/23/02 11:14 AM	Y	Returned	BASE		BPD
THOMAS NORTHROP		09/23/02 11:06 AM	Y	Originator	BASE		SETUP BUSINESS GROUP

1. It now says, "Returned" by TRAIN01 meaning they have reviewed the PR.

2. Since the PR has been sent to TRAIN02, it is now their responsibility to send the PR onward, and then mark it reviewed.

Comments

Done Local intranet 11:14 AM

Start Prism Language e-mail - Lo... Document1 - Microsoft Word VPD PRISM - EZ RE...

VPD PRISM - EZ REQ - Route History - Microsoft Internet Explorer provided by The Department of Treasury

Address: http://clonedb.arcdmz.bpd.treas.gov/prsmclon/routehistory/route\_history\_f.asp

**EZ REQ Information**

Requisition Number: BPD-GC230-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$2,500.00  
 Commitment: \$2,500.00

**Route History**

To	In Date	Out Date	Comments	Status	Version	Phone	Site
TRAIN TRAIN02	09/23/02 11:14 AM		N	Sent	BASE		BPD
TRAIN TRAIN01	09/23/02 11:06 AM	09/23/02 11:14 AM	Y	Returned	BASE		BPD
THOMAS NORTHROP		09/23/02 11:06 AM	Y	Originator	BASE		SETUP BUSINESS GROUP

**Comments**

Now I can mark it reviewed.

1. As a point of interest, by clicking on the "Y" under "Comments" I can see the comments below that someone has typed.

2. Here are the comments that I typed before.

When this particular PR gets to TRAIN02, the second reviewer would

1. Inspect the PR
2. Go to "Change Route"
3. Click "add approver"
4. Choose the approver
5. "Send" the PR to the approver

Then the Approver would:

1. Look the PR over
2. Mark it approved or disapproved.

\* If it ever says "Ready to Send" next to someone's name then it has NOT gone to them, you should try resending it, by clicking the "Send" button, if it is an option under the "Route" or "Change Route" button, or you should delete their name and then add them again, at which point you should "send" it once more. If it will not allow you to delete the name, contact the creator of the PR and ask them to go into the PR, once you exit it, so they can change the route. If they are unavailable or their efforts prove to be futile then contact the ARC Support Desk (304-480-7272) and they will put you in touch with an administrator.

**When you want to know where a PR is located, or what someone on the routing list has done to a PR, the following definitions will help, so here is a quick review:**

1. "Ready to Send" means that that person is on the routing list, but they DO NOT have the PR in their possession
2. "Sent" means that the PR is currently in that person's in-box
3. "Returned" means the person was a reviewer and that they have marked the PR as reviewed
4. "Approved" means that the person was an approver and they have marked the PR approved.  
 \* "Disapproved" means they have marked it disapproved, and it will go back to the end user.